

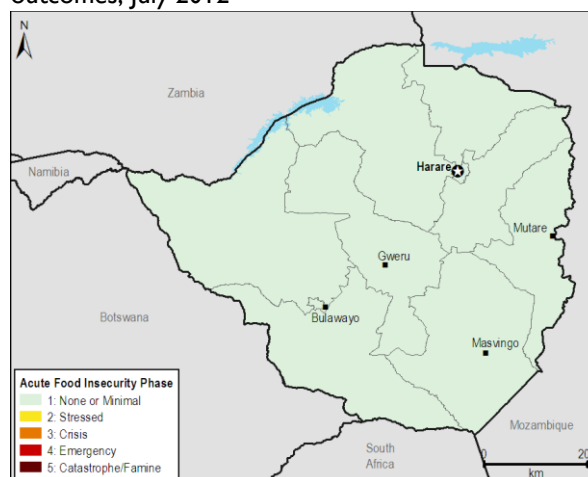
ZIMBABWE Food Security Outlook

July to December 2012

Key Messages

- Current household livelihood strategies are typical for this time of year and a majority of rural households are experiencing no or Minimal (IPC Phase 1) acute food insecurity conditions and are able to meet basic food requirements. Households in the southwestern areas of the country that were adversely affected by drought during the cropping season are still consuming food from their own production and supplementing this through market-purchases of both staple and non-staple food.
- Maize grain, maize flour, beans and oil are generally available on the market and accessible for most households for both immediate consumption and reserves. Staple food prices are currently stable although in some districts in Masvingo, Matebeleland North and Matebeleland South provinces, prices are beginning to increase. Food prices in these areas are higher than the national average of \$0.30/kg and are ranging from \$0.35-\$0.45 USD/kg.

Figure 1. Current estimated food security outcomes, July 2012

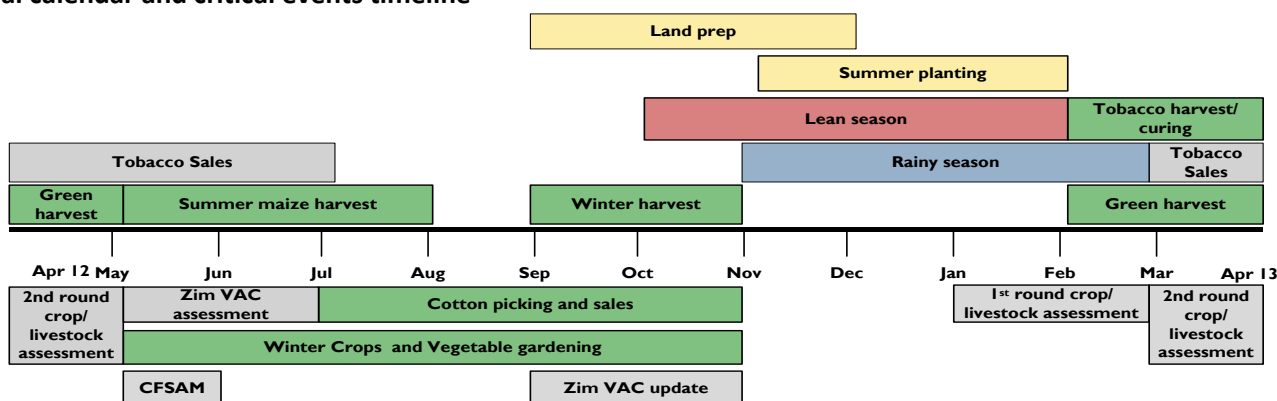


Source: FEWS NET

For more information on the IPC Acute Food Insecurity Reference Table, please see: www.fews.net/FoodInsecurityScale

- From July to September, rural households in the areas of concern will continue experiencing Minimal (IPC Phase 1) acute food insecurity conditions while receiving planned humanitarian assistance. From October to December the food security situation will likely deteriorate to Stressed (IPC Phase 2) food insecurity conditions within poor households in Matebeleland South, Matebeleland North, Masvingo and districts in southern Manicaland provinces. High staple food prices and limited labor opportunities could limit access to food for market-dependent households.

Seasonal calendar and critical events timeline



Source: FEWS NET

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Current Food Security Situation: July 2012

Despite lower production levels during the 2011/12 agricultural season, most households throughout the country are generally food secure. Households in the southwestern areas of the country that were adversely affected by drought during the cropping season are still consuming food from their own production and supplementing this through market-purchases of both staple and non-staple food. Current household livelihood strategies are typical for this time of year and a majority of rural households are experiencing no or Minimal (IPC Phase 1) acute food insecurity conditions and are able to meet basic food requirements. Maize grain, maize flour, beans and oil are generally available on the market and accessible for most households for both immediate consumption and reserves. Staple food prices are currently stable although in some districts in Masvingo, Matebeleland North and Matebeleland South provinces, prices are beginning to increase. Food prices in these areas are higher than the national average of \$0.30/kg and are ranging from \$0.35-\$0.45 USD/kg; an indication of limited food access for some households which could further contribute to the localized food insecurity situation in the southern districts.

In the southern districts in Masvingo and Matebeleland South provinces, the food reserves of very poor are beginning to become depleted and there are indications that remaining reserves will only cover up to 3-4 months of their food needs for the current consumption year. Many households in these areas are earning income for market purchases through small livestock sales (i.e. chicken and goats), off-farm casual labor and self employment activities. Households in these districts have already started increasing efforts to look for other income generating activities. It is worth noting that in the affected districts the terms of trade-maize equivalence for cattle and goats is stable, but lower than the rest of the country; an indication of diminishing purchasing power in these provinces. Livestock conditions and milk production is stable and typical for this time of the year when yields start to decline as the dry season begins. Animal quality is still fair and hence households with livestock have access to milk, which will add to their food consumption needs.

Following poor production during the 2011/12 season and expected national cereal deficits, the government has announced the extension of the Grain Loan Scheme (GLS). However the effectiveness of the GLS is likely to be dependent on the availability of maize grain supplies in the Grain Marketing Board (GMB) and cash repayments from loans made during the previous year. It is expected that unless the government plans to import more grain from neighboring surplus countries, then it will be extremely challenging for this scheme to achieve its targeted levels. Currently, there is limited information on the implementation of the project to understand its impact on food security.

The World Food Program (WFP) is currently implementing Food for Assets and safety-net programs across the country. These programs are targeting 125, 000 and 220, 000 beneficiaries, respectively. The seasonal food assistance program is planned to start in September in the 18 worst affected districts.

Markets

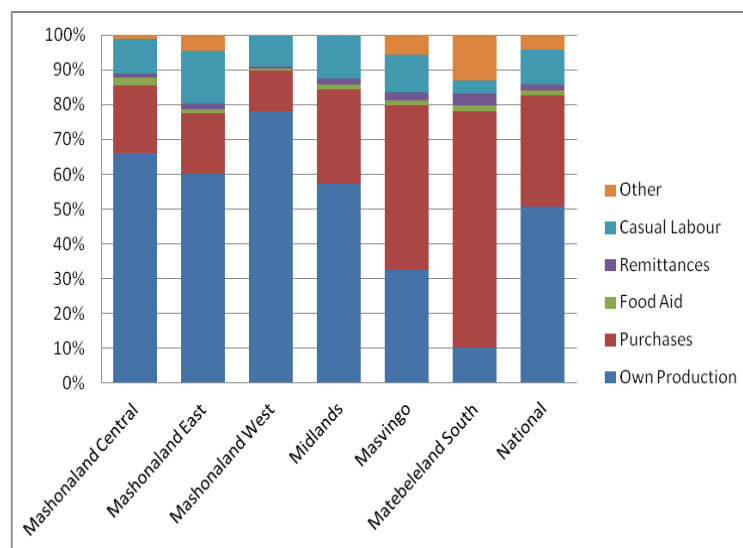
The underperformance of the past agriculture season has resulted in a national cereal requirement deficit and earlier household reliance on markets for staple maize grain or flour. For the majority of households, maize grains is obtained from their own production, through purchases, and through casual labor (see **Figure 2**). In the southern region of the country, including Matebeleland South and Masvingo provinces, the main source of grain tends to be purchases followed by own production. National average maize prices are ranging between \$0.30 and \$0.40USD/kg and have generally been stable since April 2012. However, in Masvingo, Matebeleland North and South provinces prices are generally higher than the national averages and are ranging between \$0.40-\$0.45USD/kg in some of the worst affected districts. Prices in some southern districts like Beitbridge have started to increase and are ranging between\$0.40-\$0.50 USD/kg. The districts with some of the highest grain prices (see **Figure 3**) –Masvingo and Beitbridge are located in provinces where most households are now more reliant on the market for their staple foods. These high staple food prices have resulted from increased staple demand by households at a time when main harvest stocks are declining. Formal and informal imports from South Africa and Zambia could increase food availability within the country and stabilize prices.

Most likely food Security Scenario: July – December 2012

Based on field monitoring in the Matebeleland North province, an area with low crop production during the 2011/12 agricultural season due to below average rainfall, the most likely scenario from July to December is based on the following assumptions:

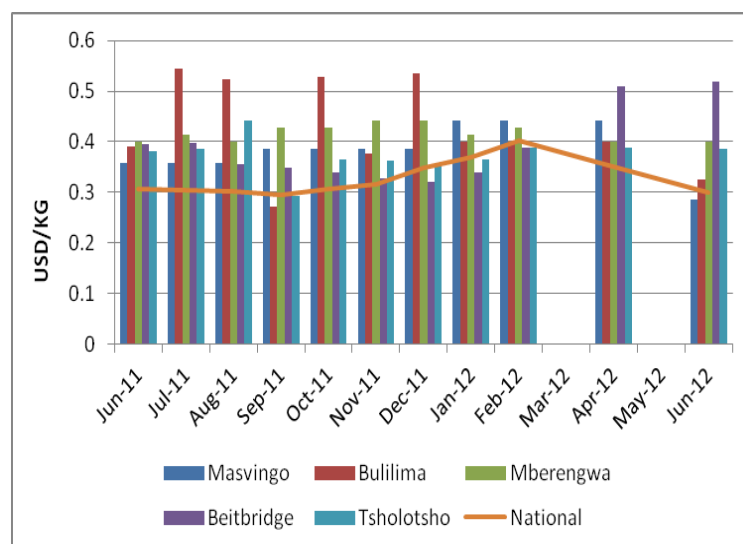
- Food availability in local markets will decline between July and December due to the poor harvest, limited deliveries to the GMB and the existing import duty on food items. Deliveries to the GMB are likely to be limited because of low yields and farmer uncertainty in the receipt of payment for grains.
- Prices of staple foods will likely increase due to this limited availability in markets. This trend will mostly affect districts in southern Manicaland, Masvingo, and Matebeleland North and South provinces.
- With an increase in the number of food insecure people and limited supply of labor opportunities, local casual labor activities will also be limited and the increased efforts by households seeking these opportunities will likely reduce the payment terms/rates for activities.
- Due to the poor rainfall in the 2011/12 agricultural season, dry conditions are expected to continue from July to December and this will likely result in the deterioration of pasture and water sources. This will impact livestock conditions and milk production with a subsequent affect on livestock marketing.
- Continued macroeconomic stability.
- The Government of Zimbabwe and humanitarian organizations will provide assistance for food insecure households during the 2012/13 food consumption year.

Figure 2. Household Maize Grain Sources by Province



Source: Agriculture Food Security Monitoring System (AFMS)- NEWU, Caritas, FAO

Figure 3. Maize Grain Price Trends in the Southern Region



Source: Agriculture Food Security Monitoring System (AFMS)- NEWU, Caritas, FAO

Given current food security conditions and assumptions projected from July to December 2012, the following food security outcomes are expected for poor households in some districts in Masvingo, Matebeleland North and Matebeleland South provinces.

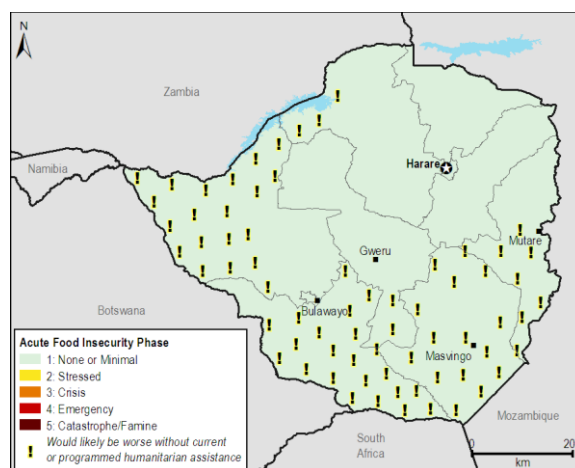
From **July to September** households in some of the low production areas are expected to experience Minimal (IPC Phase 1) food insecurity conditions and at least 80 percent of the households will be able to meet their basic food needs by relying on stock from their own production, in-kind payments for labor and market purchases. Food supplies from their own homegrown stocks are expected to be depleted between July and August. Income generating opportunities (though extremely limited) will be through non-farm casual work, sale of small livestock, beer brewing and sale of natural resources such as firewood and grass. Though difficult to quantify, some remittances will enable these households to adequately supplement their food needs for this period without requiring additional assistance. By September very poor and poor households, particularly in Matebeleland South, will require external assistance due to low crop yield and crop failure as well as the limited alternative livelihood strategies in these households. While receiving planned humanitarian assistance, households will be able to meet their basic food needs in districts of concern in Masvingo, Matebeleland North and South provinces. In the absence of this assistance, food security outcomes in these areas would likely be at least one phase worst (see **Figure 4**).

During this period water and pasture for livestock will become limited and the severity of this problem is expected to increase by October. Due to the scarcity of water, households will start to use boreholes and to travel longer distances seeking water for their livestock. This pressure on boreholes will force people to use water from less potable sources, including livestock watering points, which may result in disease outbreaks, including diarrhea.

The Government has extended the Grain Loan Scheme from March 2012 to March 2013, however due to resources constraints it is likely that the current demands will be difficult to meet. The humanitarian community acknowledges the developing food insecurity situation and has started developing food assistance plans for areas of concern.

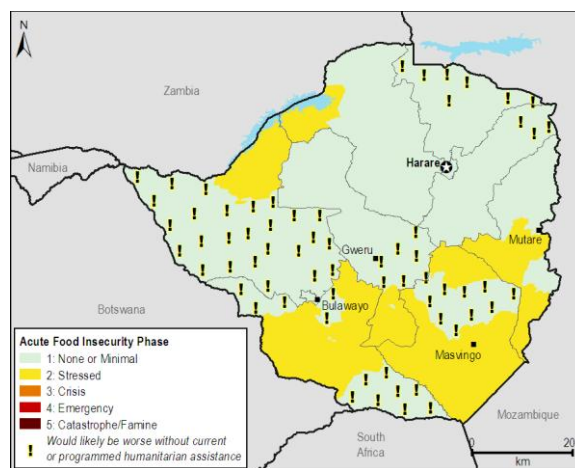
From **October to December** the food security situation will likely continue to deteriorate within very poor and poor households in Matebeleland South, Matebeleland North, Masvingo and districts in southern Manicaland provinces. Within some districts it is estimated that even with humanitarian assistance, at least 20 percent of the households will experience Stressed (IPC Phase 2) food insecurity conditions because they can only able to minimally meet their basic food needs and they cannot to afford some essential non-food expenditures. Additionally, households in some districts will be able to maintain their current livelihoods and are expected to experience Minimal (IPC Phase 1) food insecurity by meeting their basic food needs through humanitarian assistance, in-kind payments for labor and market purchases (see **Figure 5**). The majority of the very poor and poor households' food reserves will be depleted and income opportunities such as livestock sales will already be stretched, so further sales of livestock will be unsustainable. The only viable income source for the poorer households will be agriculture labor or land preparation (planting and weeding) for the next main season. However these labor opportunities may affect household time to work on preparing their land for their own production for the next main season. Staple prices are also expected to peak during this

Figure 4. Most likely food security outcomes, July-September 2012



Source: FEWS NET

Figure 5. Most likely food security outcomes, October-December 2012



Source: FEWS NET

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period as middle-income households will also begin relying on market purchases for their food sources. With the start of rains, wild foods particularly mushrooms are expected to provide additional sources of income through sales.

In the event of a reduction or break in humanitarian assistance, the districts of Hwange, Tshotosho and Beitbridge will expect food security outcomes to remain Minimal (IPC Phase 1) for poor households between September and December. All three of these districts have the geographic advantage of receiving food supplies, accessing seasonal labor, and receiving remittances from the neighboring countries of Zambia, Botswana, and South Africa.

The humanitarian assistance and food aid planned and projected to commence in September is expected to improve the food security situation for food insecure households in the areas of concern. The ZimVAC estimates that 1,184,071 people will be in need of food assistance over the next six months. Through seasonal targeted assistance programs the WFP plans to distribute 7,050 MT to 750,000 people in September. Between October and December the WFP plans to distribute 10,340 MT of food to 1,100,000 beneficiaries. A projected pipeline shortfall of 26,678 MT of food from October to December is expected.

Table 1 Less Likely Events over the Next Six Months that could Change the Above Scenarios

Area	Event	Impact on food security outcomes
Masvingo, Matebeleland North and South and Manicaland	Humanitarian response is not adequate	Pipeline breaks may further compromise food access for households which will likely result in food security outcomes in some areas being at least one phase worst.
	Increased deportations from neighboring South Africa	Any restrictive travel measures will have an impact on household income from remittances. Limits on remittances might further increase existing household food deficits as well increasing household sizes due to returning migrants. Deportations are likely end remittances for the poor households who do not have proper documents for travel and employment.
The entire country	Intensification of election/referendum campaigns	In the past, elections have been associated with instability which has led to serious disruptions of household livelihoods and contributed to food insecurity.